

Seminole County Media Conversion Study Year 2001



Produced by:

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Background Seminole County Convention and Visitors Bureau has commissioned Choice Communications Systems Inc. to conduct a year-long study of tourism advertising. Contained in this report are the results of the Media Conversion Study.

Purpose The purpose of the Media Conversion Study is to determine the effectiveness of the current advertising outlets. The study analyzes the relationship between advertising, inquiries, and actual visitation. Additionally, the study will provide detailed information on the inquirer's interest in Seminole County, if they visited and if they did not visit.

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Highlights

Print Advertising generated \$4.2 million in expenditures in 2001 which is an increase of approximately \$400,000 from last year.

Every \$1 in advertising resulted in \$34 in visitor expenditures.

For *print media*, the combined conversion rate for 2001 is 12% which is a decrease of 3% from year 2000. The 2001 conversion rate is equal to the 1999 conversion rate.

The average estimated party expenditure is \$372 per day and \$1190 per trip which is up significantly from the previous year.

Almost all inquirers are internet users. In addition to calling or writing for information, many used the internet to gather information about Seminole County.

Top competing destination are predominantly Florida locations, such as, Florida Keys, Miami, Tampa, St Petersburg, Sanibel-Captiva and Vero Beach.

Inquirers are more likely to be overnight visitors (not daytrippers).

Overall *web inquiry* conversion rate for 2001 is 20%.

Every \$1 in web advertising resulted in \$19 in visitor expenditures.

Web Advertising generated approximately \$500,000 in expenditures in 2001.

For Web-converts, the average estimated party expenditure is \$412 per day and \$2500 per trip.

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Print-Media Converts

Geographically, more than half of the print-media converts were out-of-state -- distributed almost equally throughout the south, northeast, and midwest. The average trip planning time was two months. The majority of all converts had Seminole County as their sole destination with the remaining split between Orlando and other parts of Florida. Almost all print-media converts said that they would return again in the next two years. Less than half of the converts were new to Seminole County. 40% of converts were on business travel -- they used the information to research lodging and recreation options. Of all the leisure converts, most stated that their primary activity while in Seminole County was shopping. Nature parks and outdoor activities -- including golf -- tied in second place with special events. The leisure visitors had pre-conceived image of Seminole County as a *nature* destination. That image did not change after their visit.

75% already had decided to travel to Seminole before requesting information. The remaining 25% were positively influenced by the materials sent. 20% of those that requested information also visited the website. Half of the converts fall within the age range 35-64, are married with above average income, and have children at home. Two other distinct groups exist in the married category. Those that are under age 35 with no children or over age 75 with no children. Very few single people were converts.

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**Print-Media
Converts**

Over 90% of print-media converts stayed in a Seminole County hotel, motel, or B&B. 20% were traveling with children. The majority of these visitors flew to Florida as their primary mode of transportation. Of those that flew to Florida, almost all landed at Orlando International Airport and then rented a car. Very few landed at Sanford Orlando International Airport. The second most popular mode of transportation was 'driving their own car'.

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Web Converts The geographic mix of the web converts is greater than the print-media converts. Web converts include international visitors. 71% of web converts said that Seminole County was the primary destination in their travel. Of those using Seminole County as a 'stop-over' destination, one-third were going to Orlando while the remaining two-thirds were going to other destinations within Florida. One-third of the web converts were new to Seminole County.

80% spent the night in Seminole County while 20% were daytrippers. Of those spending the night, 85% spent the night in a hotel while the remaining 15% were equally split among 'friends/relatives' or 'RV/Campgrounds'. 12% were part of a group tour or a large group traveling together, therefore, the average party size is quite large -- 5 people. A third of the parties were traveling with children. Most were traveling by their own car, however, web converts utilized a greater mix of travel including the train and plane. Orlando International Airport remains the airport of choice -- for every one person flying into Sanford Orlando International Airport, eleven people flew into Orlando International Airport.

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Web Converts One-third of web converts were business travelers. Of those on leisure, 42% were on vacation, 26% were visiting family and friends, 23% were attending or participating in a special event, and the remaining were just 'daytrippers'. 29% of the business travelers use a travel agent versus 18% of the leisure travelers. Three-quarters of the business travelers were visiting a client or prospect. The remaining business travelers were equally split between the training and seminars/conventions.

While 68% of the web converts measured their planning time by at least one month, 22% measured their planning time at about one week. Shopping remained the primary leisure activity with 'nature parks and outdoor activities' at a very close second. Sports events or other special events were third. 21% of the web converts became aware of the website through advertising. Leisure visitors had an image of Seminole County as a 'nature and parks' destination, with 'historic' and 'sports' tied in second. 43% reported that their image of the area changed after their visit. Of those that had a changed image of Seminole County after their visit, most sited that the area was bigger and had more recreational options than they previously thought.

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Web Converts Of the web converts, 60% were married. Regardless of married or single, 44% of web converts had children at home. The most predominant age group is 35-44, with the age group 45-54 second, and 25-34 third. Demographically, the web converts were younger than the print-media converts. Furthermore, the web convert group had a larger percentage of singles. Because of the greater percentage of singles, the median income of the web converts is less than the print-media converts. However, if only married converts are considered, the income is higher for the web-converted group.

Of note, 5% of those who requested information through the web did not receive it before they traveled.

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Sample and Sources Mail surveys were conducted on inquirers to Seminole County through media sources, internet, and direct contact to the CVB. Support information was used from the Visitor Profile Study and the Economic Impact Study. For these studies, CCSinc conducted in-person interviews of visitors to Seminole County from April 1, 2001 through March 31, 2002.

Sample Time Frame Media sources were analyzed from October 2000 to December 2001. Interviews began on April 1, 2001 and concluded on March 31, 2002.

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Quantities

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Benchmarks

For the Media Conversion Mail Survey:

Paper surveys: 1194 responses

For the Economic Impact Study:

Number of in-person surveys: 1983

Number of individuals represented (party size considered): 6346

For the Visitor Profile Study:

Number of total surveys (in-person and all other): 2572

Number of individuals represented (party size considered): 7424

Hotel Surveys (surveys conducted at hotel properties):

This is only a subset of the Overnight sample because hotel guests are found at all other locations.

Number of hotel surveys: 952

Number of individual represented by hotel surveys: 2190

Benchmarks for Comparison :

National Level Profiles: 1200 -- 2500 individuals

Regional Level Profiles: 1200 individuals

County Level Profiles: 850 - 1200 individuals

Subset Sample (for County): Varies greatly, 250 - 850 individuals

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Media Conversion Terminology

Inquirer:	An individual who requests information about Seminole County through media sources or 800#.
Converted:	Inquirers who visit Seminole County.
Non-Converted:	Inquirers who do NOT visit Seminole County.
Conversion Rate:	The estimated percentage of inquirers who become visitors to Seminole County.
Cost per Inquirer:	The cost expended on media per every inquiry attributed to media.
Cost per Conversion:	The cost expended on media per visitor.
ROI or Return:	Visitor expenditures because of media conversion compared to the total advertising cost. Expressed as dollars spent by converted visitor for every \$1 in advertising cost.

Special Note

The standard error for the estimates: there is a 98% chance the parameter value is within + or - 4% unless noted otherwise.

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Conversion

The principle objective of this portion of the research project is to estimate the conversion rate of inquirer to actual visitor to Seminole County. Conversion rates are identified at the media source level (example, Golf Digest magazine) when possible and at the media category level (example, sports magazine) when the single media source data is not reliable.

Methodology Summary

Surveys are mailed to inquirers for specific media. For example, Reader's Digest sends Seminole County addresses for those individuals who have requested information about Seminole County. After three to four months have passed, a sample of these individuals are sent a survey (a delay is necessary so that the individual has time to complete their travel). The survey covers their decision to travel to Seminole or a competing destination, their media habits in general, their media/research habits in regards to travel, and their demographic characteristics.

Not all media supply addresses of inquiries. The methodology compensates for this by surveying "blind" inquiries (inquiries that were not attributed to any media).

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ROI for Print Advertising

Overall print-media conversion: 12%

Total visitor expenditure generated: \$4,200,000*

Every \$1 in print advertising resulted in \$34 of revenue

** We estimate a 'swing' value of plus or minus 6%.*

Revenue

On average, those converted spent \$372 per party per day with a trip total of \$1190. Therefore, total expenditures for converted visitors are \$4,200,000.

Revenue per Inquiry

Because visitors parties spent \$4,200,000 during their Seminole stay, every converted inquiry resulted in \$141 in expenditures.

CPI

The cost per inquiry (CPI) is \$4.20 -- which is equal to the previous year.

CPC

The cost per converted *visitor* is \$9. A CPC of \$9 is well below the average of \$18¹.

ROI

Print advertising has a return of 34 times its dollar investment. In other words, for every \$1 invested in print advertising, Seminole County receives \$34 in expenditures.

¹*Special Note: Benchmarks are from various Media Conversion Studies.*

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Media Analysis Overview

Where possible, conversion rates are calculated for individual media sources, such as, *Home and Away*. If the sample does not support the individual media source, a category is created: for example, *Home and Away* has a very small sample of inquiries and returned surveys, therefore, *Home and Away* is combined with other like-sources to create a general category called Consumer Leisure. These categories are defined in the Seminole County Media Plan. By combining individual sources into a category, an approximate conversion rate can be calculated for the individual media.

Media Category

	Conversion	Cost Per	Cost Per	Return
	Rate	Inquiry	Conversion	
Consumer Leisure	12%	\$1	\$8	\$54
Nature Heritage	17%	\$2	\$14	\$26
Empty Nester	18%	\$3	\$16	\$25
Sports	19%	\$11	\$94	\$13

Consumer advertising had the greatest return for the dollar: for every dollar spent in general Consumer/Leisure, \$54 in revenue was generated by a converted visitor. Nature Heritage and Empty Nesters were second in its return with \$26/\$25 of revenue for every \$1 in advertising. Sports Travel had a return of \$13 for every \$1 in advertising.

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Consumer Leisure The Consumer Leisure category's conversion rate is 12% (average) with a cost of conversion of slightly over \$8. This category has the highest rate of return for the advertising dollar -- \$54.

Details

Consumer Leisure	Conversion	Cost Per	Cost Per	Return
	Rate	Inquiry	Conversion	
FLA USA Official Vacation Guide	12%	\$0	\$3	\$112
Compass Marketing Family Travel Co-op	8%	\$0.24	\$3	\$106
OOCCVB 2001 Spring Free Standing Insert	12%	\$1	\$6	\$56
AAA Go Magazine	15%	\$1	\$6	\$55
<i>Spring In-State (FLA USA)</i>	12%	\$1	\$9	\$37
Family Circle Co-op	9%	\$1	\$9	\$36
FLA USA Spring Out of State Newspaper Insert	12%	\$1	\$10	\$33
Southern Living Co-op	13%	\$2	\$13	\$24
OOCCVB Visitors Guide	15%	\$2	\$14	\$22

The Consumer Leisure category has the largest number of publications. For the second year in a row, the highest return comes from FLA USA Official Vacation Guide. Despite that it has the lowest conversion rate for the category, Compass Marketing Family Travel Co-op came in a close second in return for advertising dollar.

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Nature - Heritage - The Nature / Heritage category's conversion rate dropped from 21% to 17% compared to the previous year, however, the cost of conversion also dropped from \$19 to \$14. The return for this category is \$26 -- which is much higher than last year's \$17 .

Details

<i>Nature/Heritage</i>	Conversion Rate	Cost Per Inquiry	Cost Per Conversion	Return
Audubon Magazine	19%	\$2	\$12	\$30
FLA USA Undiscovered Florida	15%	\$3	\$17	\$22

The two primary publications that can be measured in this category are Audubon and Undiscovered Florida . Both of these publications perform well with the return on investment for the Audubon \$8 higher than Undiscovered Florida.

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Sports The Sports category increased its return to \$13 from \$9. While the category still maintains the lowest return compared to the other categories, on whole, the Sports convert spends an average of \$200 more per party per visit -- this is primarily due to fees for the sporting activity. This category of traveler remains small compared to the overall Consumer/Leisure traveler.

Details

<i>Sports</i>	Conversion Rate	Cost Per Inquiry	Cost Per Conversion	Return
GolfPac // Golf Digest	27%	\$6	\$22	\$21
Florida Golf Monthly	21%	\$6	\$29	\$16
Hooked On the Outdoors Magazine	9%	\$21	\$230	\$2

Hooked on the Outdoors Magazine had the highest cost per inquiry and conversion. The number of inquiries were low and the money spent by this group was below average. Although the golfing magazines tend to have a smaller amount of inquiries, the conversion rate is above well above average.

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Empty Nester

The Empty Nester category had two outlets: Reader's Digest and USA Weekend. The sample for the USA Weekend was too small to estimate a return on its value. Reader's Digest continues to be a good investment with an above average conversion rate, however, this group tends to spend less per party per trip than any other group. This publication has a long 'shelf-life' and tends to be a source of inquiries for over a year and will most likely overlap into the next media schedule. Many Reader's Digest respondents had not yet traveled but had 'strong intentions to travel' in the next 18 months. A more accurate picture of this media outlet's return can be measured at the 18-month mark.

Details

Empty Nester	Conversion	Cost Per	Cost Per	Return
	Rate	Inquiry	Conversion	
OCCCVB Reader's Digest	18%	\$6	\$36	\$25